

IV Investors' Voice

The American Chamber of Commerce in Kazakhstan

Kazakhstan's leading International Business Association



HOLIDAY ISSUE

December 2022

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#100

Gifts for All Seasons for Kazakhstan - AmCham Member Contributions



► Saule Zhakayeva (Citi) – Women's Leadership

► Alex Thomas (Apple City Cider) – Entrepreneurship

► ExxonMobil – Community Service

► Medtronic – Health Protection

► Eurasia Group – Excellence in Innovation

► Metro Cash & Carry – Environmental Protection

► Erlan Dosymbekov – Executive of the Year



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EDITOR'S NOTE



Dear Readers,

The *Investors' Voice December Holiday Issue* is always intended to be a special Issue reflecting the joy of the season. Although 2022 has brought unexpected challenges, the resumption of the annual *AmCham Awards Gala* in the autumn has led us to create a Holiday Issue devoted to the Award-Winners and their notable achievements reflecting outstanding performance by AmCham members and their contributions to Kazakhstan.

This year's Winners are a diverse group, as diverse as their contributions and achievements. 2022 marks the fifteenth year of the Awards Gala, a glamorous black-tie evening celebrated this year at the St. Regis Hotel and attended by a dozen or more Ambassadors who personally presented the Awards. The Award selection is an independent competition between companies nominated for their corporate projects and between nominated individuals whose achievements are proof of their outstanding abilities. More than one hundred Awards have been presented over these many years – always a surprise unveiled at the last minute at the podium.

The articles in this Issue as we head into the year-end Holidays are an amazing record of AmCham members' contributions to the regions and industries that they serve – proof that companies do not work around the world solely for their own objectives, but to contribute wherever and whenever help is needed, whatever the conditions. The pandemic, climate change, and energy transition have been reflected in the this year's Awards along with many other challenges that have arisen since the last Gala.

The first three articles are devoted to personal achievements – *Women's Leadership*, *Entrepreneurship*, and *AmCham Service*. The following articles run the gamut from technology to agriculture, healthcare and medical advancement, support for the disabled, and support for Kazakh culture. The projects are local, regional, and national in nature, a revelation deserving of special notice by the entire community.

May the New Year be an equally productive year for everyone to serve Kazakhstan, which is grateful for not only the Award-Winners, but for all of your daily achievements that breed success!

Doris Bradbury
Executive Director



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WOMEN'S LEADERSHIP AWARD: SAULE ZHAKAYEVA, CHAIRPERSON, CITIBANK KAZAKHSTAN

WOMEN'S CAREER IN BUSINESS - DIVERSITY AND INCLUSION SET THE STAGE, BUT YOUR DEDICATION IS THE DRIVER

There are many discussions today about the growing role of women in business, as well as research on this topic. A few years ago, Citi's research note "*Women in the Economy II*" stated that pursuing gender equality even within advanced economies could lift GDP by around 6% over the next one to two decades. This environment undoubtedly sets the scene for today and for the future growth of women's role in business. At the same time, it raises questions about the needle movers for a woman's successful career and the obstacles women can face along the way.

Many people ask me about my career path in Citi, where I have been working for more than twenty years, now serving as Citi Chairman of the Management Board. In this article, I am happy to share my thoughts about building a career and hope it can encourage more women to move forward to develop their role in business and increase their leadership skills.

Environment, diversity, and an inclusion strategy set the stage

First of all, the business environment, corporate culture, and values of the company you are working in are crucial. What the company does to create equal opportunities and foster its employees' development is important. Citi is a major global bank well-known for its business dedicated to the mission of enabling growth and economic progress worldwide. Moreover, Citi has a great corporate culture, values, high ethical standards, commitment to diversity, equality and inclusion. Citi was the first and only major bank to publicly share its goals, its pay equity gaps, and hold itself accountable for creating foundational change.

Citi has been very consistent in its steps to drive this change within the company and I can share a couple of examples here. I believe you remember the breaking news of March 2020 when *Jane Fraser* became new Chief Executive Officer (CEO) at Citigroup – the first time in history when a woman was appointed to lead one of the world's largest banks.

This year eight Citi leaders were named to *American Banker's 2022 Most Powerful Women* lists, and in November 2022, Citi was again recognized as one of the world's top female-friendly companies, occupying 52nd place among 400 companies excelling in championing women at work within the ranking compiled by *Forbes* magazine.



Since 2018, Citi has been publishing the results of its pay equality studies comparing salaries of women and men. Citi's 2021 raw gap analysis showed that the median pay for women globally is 74% of the median for men, similar to 2020. While results are improving, it shows the necessity to increase the number of women in middle and top positions, and this is something Citi continues to work on.

For instance, globally Citi increased representation for women at the Assistant Vice President to Managing Director levels to 40.6% (up from 37% in 2018). At Citi Kazakhstan women in the management team are well-represented – 50%, and 70% of women in our Kazakhstan team overall.

Your own desire, dedication and efforts are the drivers

As Citi creates an environment supporting equal opportunities, it is all about your own desire, dedication and efforts to build your career. This is often discussed at *Citi Women's Network* events, a global *Affinity Group* represented in Citi Kazakhstan since 2018. Run by employees and for employees, the Citi Women initiatives help unlock women's potential, promote their professional growth and visibility, help them connect with mentors, and pursue career opportunities.

I joined Citi as Operations and Technology Head in 2001 with responsibility for all banking products operations along with technology infrastructure and development, information security, and internal controls. I remember the time I attended a training and coaching session tailored for female Citi leaders in the EMEA region for several months, uniting colleagues from different countries, functions and businesses.

It was a great opportunity to ask myself the right questions about my future career and setting relevant goals. While attending these sessions, it became clear there were no limits for me to define my career path. I understood I needed to plan my career, determine the next goal, and develop appropriate skills. My next career goal would be either vertical or horizontal.

At that time I wanted to move into Corporate Banking and so I decided to gain more experience with the front line. I moved into the role of Head of Citi Transactions Services (CTS) where I led a team responsible for market-leading CTS solutions for the vast majority of services Citi provides. After a few years in this position, I progressed to *Corporate Banking Head* and *Global Subsidiaries Group Head* in Kazakhstan.

Asking for feedback is essential

No matter if we speak about men's or women's career, it's important to ask for feedback regularly to understand your strengths and the development areas you need to focus on going forward. It's great if you have a system that helps you do that, but otherwise you need to find the way to receive feedback.

Citi's performance management system is an essential instrument for employee development with performance appraisal circles: 360 degree feedback, development discussions, training sessions and



mentoring programs. I believe it is important to accept feedback, even sometimes constructive criticism in a positive way, be honest with yourself, and move the needle of your development.

Value people around you

You can learn a lot from people, thus network building to learn from others, building partnerships, embracing new ideas, increasing your knowledge and expanding your experience are important.

Learning, engagement and exchange of support with people you work with are highly valuable. Along my way in business, I have received a lot of support from my peers, managers, and the teams I worked with, and I am sincerely grateful for this. I am highly motivated by the energy and dedication, common goals, challenges, and achievements we share and the opportunities ahead of us.

For me it is equally important to be supported by my family and my husband who has always said there was nothing I couldn't do and achieve. That always made me stronger. During my 20+ years at Citi, I have been motivated and blessed to work in Citi's landmark corporate culture, performing the most satisfying job I could ever imagine for myself.

While my personal story may differ from others, I want to encourage every woman to choose and walk her own path, follow her dream and enjoy what she does every day.



AmCham Service Award: Donald Townsend

SERVICE TO AMCHAM AND TO KAZAKHSTAN - THE INTERMINISTERIAL INTELLECTUAL PROPERTY WORKING GROUP

There are many forms of service that simultaneously benefit AmCham and Kazakhstan, but the outstanding service that won this year's AmCham Service Award was performed over many years by Donald Townsend, who founded the *InterMinisterial Intellectual Property Working Group* at the recommendation of the Prime Minister and has carried the Group's work to success. Intellectual Property is a huge topic, not always well-understood, that still has a long way to go both in Kazakhstan and around the world. It has developed in the past decade or longer to apply not only to technology, but to virtually all sectors of the economy.

AmCham's *InterMinisterial Working Groups*, of which there are currently three, were created specifically to meet with the relevant ministries to influence and extend the legal framework for their topics. The *InterMinisterial Intellectual Property (IP) Working Group* began ten years ago with meetings at the Justice Ministry, then expanded its focus to the Health Ministry, where strengthening pharmaceutical patent protection was a top priority. Unfortunately, pharmaceuticals are not always reliable in their legitimacy, presenting serious risks for patients who rely on these medicines in pharmacies, clinics, and hospitals.



At the beginning in 2012, Don Townsend was based at the U.S. Embassy in Moscow under the *U.S. Patent and Trademark Office as the Regional Intellectual Property Attache*, a position that required constant travel throughout Central Asia and the Caucasus to address IP issues in each regional country. However, Don found time to travel to Kazakhstan each month to chair the InterMinisterial Group in its meetings at the Ministries and at the *Prime Minister's Council*, an AmCham Council that met (and still meets) each month with the Prime Minister and Cabinet to discuss priority issues for Kazakhstan's development.



Pharmaceutical patent protection and its various offshoots – healthcare reform, pirated medicines and consumer products, trademark infringement, IP training of prosecutors and judges, and the expansion of IP to many industries experiencing heavy counterfeit damages – were common topics for the Council. Don participated in and led these Council meetings.

In 2017, Don's five year tour as IP Attache in Moscow ended and he returned to the U.S. as a patent attorney for *U.S. Army Medical Research and Development Unit* where he worked on vaccine, pharmaceutical, and medical device development and licensing. At the outbreak of Covid-19 this Unit was tasked to engage on vaccine development under Operation Warp Speed. Don worked at OWS with the 3 large pharmaceutical companies that were eventually successful in developing the vaccines that are well-known today.

In 2021, Don moved to the *National Institutes of Health (NIH)*, where he worked on vaccine contracts. Soon after his arrival at NIH, he was offered a position in the *U.S. Foreign Commercial Service as Senior Commercial Officer* at the U.S. Consulate in Almaty. He arrived that summer take up this new position, re-engaged with AmCham, and rejoined the *InterMinisterial IP Group* as an Advisor prepared to pick up IP in its recent, more complex development.

Taking on both 'jobs' was a heavy responsibility, and so a new IP Chairman was appointed – *Adilet Nazarbayev*, who heads *Janssen (Johnson & Johnson)* for the CIS – one of the leading Covid-19 vaccines - but with Don as the Group's IP Advisor focused on pharma and biotech.

The IP/Pharma Working Group resumed under Adilet's and Don's leadership in May 2022, and immediately drew interest from the AmCham stakeholder members in the healthcare space. The Group and the AmCham membership now includes all the leading international pharmaceutical companies operating in Kazakhstan. Beyond strictly pharmaceutical members, most recently one of the world's largest medical device makers, Medtronic, joined the Group, and more leading healthcare members that have recently joined AmCham have immediately gravitated to the Group.

Initially, WG meetings began in the summer of 2021 solely with the Health Ministry, chaired by the Ministry's Deputy Minister Burkitbayev. After 2 meetings, both sides agreed that additional ministries should be involved in the discussions to achieve a broader range of objectives and to handle jurisdictional issues. A recent meeting in Astana was chaired by Justice Ministry Deputy Minister Akhmetova and including the *National Intellectual Property Office/ Qazpatent*. The meeting was held in the new *Qazpatent* offices to discuss patent linkage in the Health Ministry's registration process, as well as other crucial issues for healthcare reform.

Thus, the IP Working Group formed in 2013 has been reborn as a dynamic IP/Pharma WG focused on healthcare industry issues. The Government has shown a new and more active commitment to collaborating on improvements to the IP environment in this space, as well as general reforms in healthcare

to improve patient access to medicines, previously a lengthy process that delayed critical treatment to patients.

AmCham continues to lead in assisting stakeholders' engagement with the Government and opens doors to high level ministerial access. Given the expanded understanding of IP and its importance for many industry sectors, together with the Government's commitment to actively work on IP issues across many industry, it is hoped that the Group will be able to undertake a broader range of IP advocacy. A recent Council session with the Prime Minister and Cabinet heard presentations about IP impact on the telecommunications and retail fashion industries – true diversity that will continue in a changing IP environment.

Don Townsend and the InterMinisterial IP Working Group that he founded in 2013 will continue its crucially important advocacy in 2023 – ten years after the Group was created. Healthcare will continue to be a major focus, but the many offshoots in Kazakhstan's business operations, including tax implications, will also continue to develop.

Don Townsend is uniquely deserving of the AmCham Service Award as a result of his persistence and dedication to the Group he founded so many years ago. He is performing a true service to Kazakhstan and has taken up leadership in an area of knowledge that few people possess. This is a valuable, long-term service to Kazakhstan as it develops its increasingly sophisticated economy based on many industries.



ENTREPRENEURSHIP AWARD: ALEX THOMAS, FOUNDER AND PRESIDENT, APPLE CITY CIDER

AN ENTREPRENEURSHIP SUCCESS STORY – CIDER FROM ALMATY'S WORLD-FAMOUS APPLES

Something that always surprised me over the years working on my cider project, is the number of people that express surprise as to why I chose Kazakhstan as the location for my cidery. “Why here?” or, “Is cider popular there?” are two questions I’ve been asked both here and abroad with greater frequency than I ever would have expected.

This demonstrates that the natural history of the apple is still a story that a lot of people don’t know despite the apple being so iconic, universally consumed and loved around the world. And so as a company, we’ve chosen to highlight that story with our brand, *Almaty Wild Apple Cider*, with the central part of our marketing message being the provenance of the apple and its spread from the Tian Shan mountains across the globe.

There have been many competing theories and controversies about the evolution and origin of the apple with a number of countries laying fierce claims to being the birthplace of the fruit. Indeed, it can surprise people anywhere that apples are not native to their own countries, given the status the apple holds within so many national cultures, traditions and histories.

For those readers unfamiliar with the story of the *Malus Sieversii*, it started with the German-born botanist *Johann August Carl Sievers (1762–1795)*, renowned for his exploration of Central Asia and Siberia. It was he who discovered and first documented the Sieversii wild apple, which now carries his name. *Carl Friedrich von Ledebour*, an Estonian-German biologist, was another scientific explorer who provided vivid details of the plentiful canopies of the apple forests of the Tien Shan mountains in 1833. The theory that this region of Central Asia was the centre of origin for the domestic apple was later expanded by the Russian scientist Nikolai Vavilov who explored the forests of Central Asia in the 1920s.

Significant work was done by the Kazakh scientist *Aymak Djangaliev* to preserve Kazakhstan’s wild apple forests after widespread deforestation during the Soviet period. Today the forests sit within protected natural reserves. But it was in 2010 when a team of 86 global scientists from 20 academic institutions around-the-world sequenced the genome of the domestic apple, *Malus Domestica*, for the first time, that the origin of the apple was finally proven beyond doubt. Publishing their findings in the journal, *Nature*



Genetics, the scientists discovered that Kazakhstan’s *Sieversii* was indeed the wild ancestor to which all 7,500 different apple varieties around the world can be traced, with the epicentre being the forests just outside of Almaty.

Apples first began their voyage of proliferation beyond these forests, with their seeds through the faeces of the local fauna, bears and birds, that consumed them, with apple seeds surviving the journey through their digestive tracts intact. The study reported that apples began to be cultivated in central Asia some 3,000 to 4,000 years ago. As ideal snacks for travellers, they then spread further, both east and west along the old Silk Road.

With archaeological evidence showing us that intentionally fermented drinks from grains, grapes and honey existed as long as 10,000 years ago in the Neolithic or Stone Age period, it’s less clear when cider emerged as a separate drink. Carbonised apple seeds were found in early settlements dating as far back as 8,500 years in what is now modern Turkey, leading some historians to argue that cider is older than civilisation and as old as beer or wine. But with apple juice significantly harder to make than grape juice, which only requires a pair of feet, it is debatable when cider came into existence.

We do know that wealthy Romans living on large estates cultivated apples in orchards (having learnt this from neighbouring Greek colonies) and crushed them to make cider in the same presses they used for making olive oil. Cider’s spread throughout Europe, particularly in France, Spain, and Britain saw it rival wine in France in popularity until the intervention of the monarchy, while the Hundred Years War between

England and France saw cider surpass wine as the preferred drink of the English aristocracy.

The history of cider in the US goes back to its first colonial settlements, with the Mayflower bringing apple seeds and cider presses with it to New England. Until the temperance movement began to influence public opinion and finally prohibition, cider was the most popular drink in the US and could be found in almost all American homes. Post-prohibition beer, which can be made in a matter of weeks with water as the principal ingredient, made its way into the affections of the nation's citizens instead. Cider, made from special cider varieties of apple tree, many of which had been ripped out during prohibition, never regained its position of dominance although a recent boom in US cider consumption started in the 1990s and is still going strong today.

Other traditional cider-making countries include Germany, particularly the Hesse region around Frankfurt where around 30 specialist cider bars can be found near the Main river in the city's old Sachsenhausen quarter. Russia where cider was forgotten during the Soviet era, is now undergoing a popular revival, as well as Austria, Finland, Ireland, Norway, and Sweden. Cider is produced and readily available in Canada and the US, Argentina and Chile in South America, Australia and New Zealand, and South Africa.

Cider is also gaining a foothold in lots of other non-traditional cider-making countries with cideries opening up in places like Cambodia, China, India, Italy, Japan, the Middle East, South Korea and Switzerland. In short, cider is produced and consumed all over the world, but not in the actual birthplace of the apple.



When I first visited Kazakhstan in 2011, I was working for a large company that provided academic and business data and journals for almost every industry imaginable. At that particular time I was an editor for a department that covered the aviation industry and I used to fly around the world interviewing airline



CEOs about their strategy. This was how I came to Kazakhstan to interview Air Astana president Peter Foster, when I encountered my wife, Aizhan, who was sitting in the seat next to mine on the journey back to London.

Previously I had also worked for another department of the same company that covered the drinks industry, interviewing French winemaker Louis Latour, whose name can be found on bottles of French Burgundy in most vinotecas in Almaty and Astana. I also lived for two years in Champagne narrating about life in France, about the French culture of wine consumption and production.

As enjoyable as airplanes and flying were, they couldn't compete with the allure and glamour of grand candle-lit dinners in French castles as prestigious winemakers opened their best bottles. Making homemade cider, beer and wine with my father in my teenage years, I knew I wanted to go into commercial production, and marrying a Kazakh made the decision totally clear about how this would happen. In 2014 I decided to uproot my young family from our home in London to return to the birthplace of the apple and Aizhan.

We started off by assessing the properties of local apple varieties such as the acids, availability, pectins, sugars and tannins, and began fermenting those we found to be suitable. This of course included varieties of the *Malus Sieversii* wild apple. When these were ready and after a period of maturation, we experimented with blends, each year refining our processes and experimenting with different production techniques such as cultured, malolactic and wild fermentations, and barrel-aging.

Parallel to this we were looking for land to build the cidery which we found in the city of Talgar outside Almaty, which not only had a stunning view of the mountains but is where many apple orchards are located. We built a 1,200 square-metre production facility, carefully selected our production equipment,

went on cider training courses, attended cider conferences, visiting and sometimes working at other cideries, and read every cider book imaginable. During our cider journey we befriended some of the world's top cidemakers and cider educators and discovered that, having dedicated their careers to the apple and cider, they all wanted to visit Kazakhstan and see the wild apple forests themselves!

Since the forests are in protected natural reserves, this is not something that is easily achievable, so we decided to secure the permissions ourselves from the Ministry of Agriculture, invite them over and film a documentary about it. We invited five guests from Canada, the UK and the US and took them into the forests so they could see for themselves the story of the evolution of the apple in Kazakhstan. Needing to secure permissions to go into the reserves, climbing into the *Dzungarian Alatau* mountains by foot through what is essentially a jungle of apple trees, accompanied by the foresters, and finally getting to the top with China right in front of us was an amazing once-in-a-life-time experience. To share it with some of the world's top cidemakers was a rare privilege that can be seen at www.ciderinkazakhstan.com.

By early 2020 we were ready to go into production but had to spend some time securing our production and sales licenses. The production license, secured in 2020, allowed us to harvest, press and ferment our first batch of cider which spent a year maturing while we secured our sales license. We received the latter in late 2021 allowing us to bottle our *Almaty Wild Apple Cider* and start supplying cafes, restaurants, shops and supermarkets in Almaty and Astana.

Since then we have also started supplying Karaganda and Kostanay and will begin exports to the US in the first quarter of 2023 with exports to Asia, Europe and other cities in Kazakhstan following shortly afterwards. In our first year of production we only had one product to keep things as simple as possible and maintain a high level of quality. However, 2023 will see some new product releases from the *Apple City Cider Company*.

It's fascinating to see how Kazakhs have responded to cider, given the drink's lack of history in their country. The first time I even saw imported Russian cider start to be available in Almaty was in 2018, but Kazakhs love their country's natural history with the apple and cider proving popular. Aizhan and I are often thanked by people who are proud that a cidery has opened in Kazakhstan. Those that already knew cider from Europe, North America or Russia often pay us compliments about the quality of our cider compared to what they've tried before.



I explain that often what they've tried will be what's known as mass-market, 'industrial' cider, fermented quickly from concentrate using chemical additives and mixed with water and sugar. This cider is not aged or matured in order to keep costs down and allow the production tanks to be used again a few weeks later, rather than the following year.

Given a blank slate in Kazakhstan where most people do not have expectations of what cider should be is an amazing opportunity to drive cider culture and the public perception of what cider is. To our minds, cider is wine, a natural, high-quality fermented fruit wine that reflects the *terroir* of where the apples it is made from grow. With our *Almaty Wild Apple Cider* product that we refer to as our 'Classic' variety, I have attempted to make a balanced, floral, fresh and fruity cider that I hope reminds people of walking through a blossoming Almaty apple orchard in springtime.

Another variety soon-to-be available, but in much smaller quantities, will be our 'Export' cider, which will be big, bold, complex, oaky, tannic and extremely dry. It will be at a higher price-point due to additional production costs such as the ageing in oak barrels and malolactic fermentation and will be reminiscent of the strong flavours of the fruit of the apple forests at harvest time.

Due to these bold flavours, it won't be to everybody's taste. But contrasting strongly to our 'Classic' *Almaty Wild Apple Cider*, it will be another expression of the *terroir* of Almaty's apples, extending the range and defining the style of Kazakh cider and how the world will see cider from the birthplace of the apple. It is this chance to define what Kazakh cider is, that is, for any cidemaker or winemaker, the opportunity of a lifetime, I feel very privileged.

EXCELLENCE IN INNOVATION AWARD: EURASIA GROUP

INNOVATION IS CRUCIAL FOR AGRICULTURAL DEVELOPMENT

Why are innovations so important? They provide any business with absolutely new opportunities.

For several years Kazakhstani farmers have been discussing the possible digitalization of agricultural processes, and the most progressive farmers have already begun applying digital technologies in their business. In fact, farmers have been searching for new approaches to improving labor, increasing yields, and reducing costs for a long time, leading them to investing in cutting-edge machinery able to cultivate huge areas within a short period of time and to gradually innovative solutions able to monitor all work processes and take agriculture to the next level. In the process, they have also sought partner-companies helping them resolve challenges and achieve their goals.

Eurasia Group Kazakhstan, the official John Deere distributor in Kazakhstan for the past twenty years, has been constantly searching, developing and offering the most innovative solutions for Kazakhstan's farmers since the first day of its dealership. We were the first company to deliver self-propelled sprayers and precision seeders to the Kazakhstan market, and in 2005 we brought *Parallel Trac*, the first navigation system, to Kazakhstan as well – the solution no other competitor could offer for a long time.

Eurasia Group has a passion for innovation that underlies our company's strategy and values. Eurasia Group understood long ago that precise farming and digitalization are the future of agriculture. The boundless possibilities of digital technologies make it possible to increase the profitability of agricultural business two-three times over by means of total control, analytics, cost reduction, and a decrease in the human factor. Although for some farmers digitalization is still the future, we have already digitalized 2,5 mio hectares of land with John Deere solutions in Kazakhstan.

This year the Eurasia Group won an *AmCham Achievement Award for Excellence in Innovation* for two innovative agricultural solutions – absolutely new solutions without parallel in today's agricultural market. Both were developed by Eurasia Group: *AgroTechReports* based on the *SmartAgroExpert* platform as the first solution and *Digital MTC* as the second solution.



AgroTechReport is a complex solution that includes two types of reports that a farmer will receive - technical and agronomical.

Technical reports are generated from any self-propelled John Deere solution connected to the *JDLink* telematic system. The technical data goes to a farmer's account at the *John Deere Operations Center* in real time. This report contains the following information: operation start and stop times, total cultivated area of a field or a part of a field, speed and performance of every machine, technical factors, spent fuel and possible failures. Each of these criteria helps the machine's owner save money by preventing repairs, idle time, and non-use of all possible i-Solutions.

To receive an agronomical report a farmer needs a self-propelled John Deere solution connected to *JDLink* ready for mapping each operation in the field, information that will be also sent to *MyJohnDeere* Operations Center. An agronomical report includes information about product flow rate (seeds, crop protection products, etc.) per hectare and the economic value of the work done, indicating performance, application rate (planned rate/ actual rate), and commercial spread. Agronomical reports inform about all possible faults and gaps.

Why is this kind of report important for a farmer? It helps to understand, using the received data, what kind of processes should be improved in order to increase yield and avoid extra expenses.

Each type of report is separately available for almost any farmer who owns John Deere machinery manufactured after 2015 (or earlier, but additionally equipped). But what can a farmer do if he cannot read and correctly analyze technical reports coupled with agronomical reports and use this information for further planning?

This is the task for *AgroTechReports*. Both technical and agronomical reports are received by the *SmartAgroExpert* platform, specially developed by Eurasia Group, where technical rates can be added to the agronomical report, forming a final complex report with a full understanding of field operations and the steps that should be taken to improve results. It's important that even if several machines are operating in a field, *AgroTechReport* will summarize the results and provide comprehensive information about the whole field.

Based on the *AgroTechReports* our customers used this year, we were able to calculate the average effectiveness of this solution. We found that productivity increased up to 30% depending on the machine and digital solution application volume.

It's important for every farmer to learn everything about his fields and to control his machinery fleet's condition if he wants to increase his business profitability. *AgroTechReport* helps to achieve this with precision, saving the historical data from one year to another, providing growth of income and cutting expenses.

The second solution developed by Eurasia Group is a unique solution in Kazakhstan's agricultural market – *Digital MTC* (contractors' service).

John Deere self-propelled solutions for yield protection makes it possible to cultivate huge areas in a short period of time, precisely and cost-effectively. Most farmers would willingly use this solution on their fields, but it is not always possible to renew a machinery fleet immediately. Thus, we offered *Digital MTC* for farmers who do not have a sprayer or enough machines for the fields. The field area is of no importance!

But *Digital MTC* and spraying services differ. *Digital MTC* is a solution that includes:

- A sprayer
- Crop protection products of premium quality, individually recommended by Eurasia Group agronomists, depending on field specifics and customer's demands

- *i-Solutions*, including:
 - *Verge* – optimizing the sprayer's movement in a field, creating optimal path plans (minimizing economic and environmental costs while maximizing field efficiency)
 - *Pessl iMetos* (weather stations defining weather conditions on every field and predicting the best time for spraying)
 - *Taranis* – field-scouting followed by plant-disease analytics
 - *Stenon* – soil analysis directly in the field, in real time

All these solutions help a sprayer avoid extra expenses for products, control the application rate depending on soil and plant condition, and postpone work in a field if rain or wind are expected. After spraying, every farmer gets an *AgroTechReport*.

The *Digital MTC* project was a success with Kazakhstani farmers this year. In 2022 we treated 25,000 hectares of land with this innovative service.

Eurasia Group strongly believes innovations are an integral part of life, a crucial part of the immense growth and development of everything around us that makes us special. We are innovators, every day producing the best for Eurasia Group customers and humanity.

Over the past 20 years Eurasia Group has continuously sought and found the most innovative, efficient, unique solutions for Kazakhstan's agriculture, first of all testing the solutions ourselves and then offering them to our customers. Kazakhstan's agricultural sector has enormous potential for future development. We are proud to be so closely involved in increasing Kazakhstan's agricultural opportunities and marketability worldwide.



ENVIRONMENTAL AND SAFETY AWARD: METRO CASH & CARRY

NEW REFRIGERATION EQUIPMENT TO BATTLE GLOBAL WARMING

More and more companies are growing concerned with how their business affects the world and are trying to minimize their impact on the environment. Future-ready companies prioritize such practices as rational use of natural resources, rejection of harmful raw materials, and reducing their carbon footprint.

The METRO AG - F-Gas Exit Program (FEP) is an international program and one of the projects that uphold those standards. The F-GAS-Exit program is part of a global initiative committed to reducing our carbon footprint as well as using less environmentally harmful fluorocarbons (*F-gases*) by means of replacing refrigeration units in METRO's stores and warehouses. Not only is fluorocarbon-run equipment more energy-consuming, but it is also detrimental to the ozone layer. Nowadays there are more eco-friendly alternatives that run on natural refrigerants, which is what METRO utilizes in its program.

This year the project was launched in Kazakhstan as a part of the F-GAS-Exit program. In 2022 METRO's stores and warehouses in Almaty and Astana began their transition of low-temperature equipment which runs on natural refrigerants. Now Almaty has its first store where low-temperature cabinets have been replaced with refrigerators that run on propane (R290).

METRO is the first company in Kazakhstan and Central Asia to incorporate natural refrigerants into its refrigeration systems. Currently *freon and ammonia/ NH3 (R717)* are still widely used refrigerants in the country.

Despite its recent launch, the project has already yielded positive results. According to METRO's representatives, the new equipment leads to a 15-20% drop in energy use. In October 2022 the project for the transition to eco-friendly refrigeration equipment "*F-Gas Exit program in Central Asia*" won the "*Environmental and Safety Award*" presented by The American Chamber of Commerce in Kazakhstan at the AmCham Achievement Awards 2022.

"Steady growth and careful treatment of the environment are fundamental values at METRO. We are striving to minimize our environmental impact both globally and locally. The F-Gas Exit program is the next logical step in our initiative for the rational use of resources, only now we are doing bigger scale projects and involve all cities where we operate."



We thank the business community and expert groups for supporting and bringing awareness to projects like these. The high praise of our work motivates us to work on creating an environment-friendly business. Low-carbon tomorrow equals a greener tomorrow" states Natalya Markhiyeva, CEO of Metro Kazakhstan.

In two years, the company is planning to switch four stores and warehouses to the new refrigeration systems. By 2028, four more METRO branches will be switched completely to using natural refrigerants. This isn't the company's first initiative aimed at CO2 emissions reduction. Currently all stores, warehouses and the headquarters use only energy-efficient lighting.

Part of the bigger picture

Global METRO's F-GAS-Exit program is part of the company's commitment to reduce its own CO2 emissions by 50% by 2030 (base year: 2011). By the end of the fiscal year 2017, METRO had already reduced its CO2 emissions by 21% and as of today by 37% through a corresponding mix of measures. Since 2013, METRO has been starting to work intensively to phase out F-gases in refrigeration in all METRO stores worldwide by 2030 and – as far as technically and economically feasible – to replace them with natural refrigerant systems.

METRO Kazakhstan is doing its part in reaching these fundamental goals. The project's initial results prove that the company is on the right path. By successfully integrating modern equipment and technologies, METRO is growing and creating a safer future.

ENVIRONMENTAL AND SAFETY ACHIEVEMENT: EBRD

A GREEN ECONOMY FOR KAZAKHSTAN

Under the *Paris Agreement*, Kazakhstan has an ambitious nationally determined contribution (NDC) target to reduce its greenhouse gas emissions (GHG) by 15% by 2030 compared to 1990 levels. In order to assist Kazakhstan achieve this target, in 2019 EBRD approved its *Pilot Green Economy Financing Facility (Pilot GEFF)* with a total loan volume of up to USD 30 million in support of local currency lending to micro, small and medium-sized enterprises (MSMEs) and the residential sectors in Kazakhstan for energy efficiency, renewable energy, and resource efficiency purposes by providing term financing to partner financial institutions (PFI).

The PFI loans are supported by a team of consultants to enable each PFI to:

- identify the target customer segments for green investments, develop marketing and product strategies, and prioritise internal resources for the new green financing opportunities;
- aid MSMEs borrowing under this Pilot GEFF in structuring their projects and preparing them for financing.

To incentivize Kazakh businesses to adopt green technologies and become more energy efficient, the Pilot GEFF is supported with non-refundable co-investment grants of up to USD 3.5 million for investment incentives to participating MSMEs.

Despite strong headwinds - first the Global Pandemic starting within weeks of GEFF's launch, followed by the events of January 2022 and then the war in Ukraine - by early 2022 the entire USD 30 million had been on-lent to three PFIs, *KMF*, *BCC* and *Shinhan*. So successful was this Pilot that already by June 2022, GEFF Kazakhstan II was approved by the EBRD Board for USD 150 million, a volume five times the initial amount.

So what has EBRD achieved in numbers?

- 1,271 loans disbursed by PFIs to eligible MSMEs
- 2086 products added by 130 green technology vendors to the *EBRD Green Technology Selector* platform for Kazakhstan
- 177,880 tCO₂e emission reduced annually (equivalent to almost 9362 flights from Almaty to Astana on Air Astana)
- 2,054,802 GJ of energy saved annually
- 210 PFI employees completed the *Green Finance Academy* and the *Gender and Social Inclusion* training
- And of course, the main achievement that cannot be quantified - helping save our environment.



ENVIRONMENTAL AND SAFETY ACHIEVEMENT: PHILIP MORRIS INTERNATIONAL

THE STOPMUSOR LITTERING PREVENTION PROGRAM

It takes two weeks to develop a new habit, and yet it may take years to break the established habits. However in just two years Philip Morris Kazakhstan's littering prevention project *StopMusor* has been able to reach three million people to foster behavioural change and improve habits towards environmental protection, using one simple message: stop littering. Littering spoils the environment and pollutes the land and water, eventually affecting the whole ecosystem, resulting in severe sustainability issues not only in Kazakhstan, but globally.

Our planet is overwhelmed with the volumes of products that humanity now consumes daily. Consequently litter is found everywhere: in the cities, rivers, oceans and even within the human body. When litter is disposed inappropriately it may disintegrate into microplastic particles, then fuse with the water and food we consume, and in the final analysis the plastic circulates back to us.

It is commonly understood that waste recycling is a key step to combat littering, but unfortunately in Kazakhstan not all people dispose of litter appropriately. Too often people litter in public places even if the trash bin is nearby.

As a tobacco company, we acknowledge that cigarette butts are among the most frequent littered items and so Philip Morris Kazakhstan seeks to change behavior to prevent littering and to encourage proper waste disposal. In 2020 PMK launched a pilot anti-littering awareness campaign, *StopMusor*, in Kazakhstan's two largest cities - Almaty and Astana - and later expanded it throughout all regions of Kazakhstan.

The *StopMusor* campaign is designed to raise awareness about the hazardous consequences of small trash littering in public places and to educate people about responsible waste disposal.

Consumer waste is one of the greatest issues of the new era. This complex problem can only be solved with the engagement of society as a whole: businesses, NGOs, government, activists. The *StopMusor* project therefore established a strategic partnership with the *Association of Ecological Organizations of Kazakhstan*, the environmental community's largest association. This partnership perfectly reflects the campaign's objective: society's ecological education to drive positive behavioral change and achieve harmony between human activities and environmental protection.

An Online Instrument to Engage People

Any interested person could follow or take part in the project in the few clicks – a website (stopmusor.kz) and a mobile app have been developed not only to inform users about program activities, but to give them an instrument that allows them to contribute to preventing littering in practice.

The project used an innovative approach by embedding an eco-map function that enables tagging of a spontaneous dump or any other urban eco-problem location. Thanks to the eco-map, requests are collected and sent to the municipal administration to further assess and resolve the ecological problem. The request's status can be tracked and the administration can be informed once the issue is resolved. *Eco-maps* can be used across the country. More than 500 requests have been processed to date.

Results

Launched in June 2020, the campaign managed to generate more than 150 media publications and hold 60+ events and activities both offline and online, thus engaging more than three million people in over 24 months.

Shortly before the program launch, a survey was conducted with the sociological agency among the citizens of Almaty and Astana to measure the baseline of perceptions about littering and ecology in general. After 12 months, a repeat survey

was conducted to identify whether attitudes had changed. The results showed that the following indicators changed, proving that the awareness campaign had produced an impact:

- 9% increase in the number of people who now do not litter the streets
- 15% increase in the number of people who believe that indifference to the environment is the root cause of littering.

Events

To convey the key message to the project's target audience, a multi-channel approach was used and delivered through a series of interactive events, outdoor billboards, website, mobile application,

broadcast on national television, public service centers, public transportation, and social network sites.

From the beginning, the project planned a series of events to discover that the root cause of littering lies in people's attitudes towards waste disposal – all of them connected through ecology, art, and social activism.

Immediately after the campaign's official launch, plastic bags were collected in Astana. Collectors of plastic bags received branded eco-bags, hats, and t-shirts with the project's logo. In only three days more than 4000 plastic bags were collected and used to create an art exhibition by the well-known contemporary artist, Saule Suleimenova. She produced a 3x4 meter installation, *Under the Astana Sky*, fully created from plastic bags and placed in the city park to attract passersby with its idea. The exhibition was later transferred to Almaty and installed in a popular walking area to attract attention.

A series of clean-up events were held together with the finalists of the popular *Miss Almaty Contest*, with the *National League of Volunteers*, and on *World Clean-up Day*. Supported by beauty contest finalists, a clean-up event was held on the *Tamgaly Tas* historical site, which is badly littered left by tourists. During *World Clean-Up Day*, 24 locations were cleaned-up in Almaty and Astana by more than 1000 people together with the local eco-activists and NGOs.

In partnership with the *State Museum of Contemporary Art*, a week-long exhibition was held in Almaty

showing the work of more than 30 artists focused on Kazakhstan's ecological problems. The exhibition was also broadcast online by popular art galleries to reach people who could not attend the exhibition.

Another remarkable event as part of the project is *Eco-Talks*, a platform for ecologists and activists to discuss ecological problems and to propose action plans for their resolution. *Eco-Talks* was launched with an offline event in Almaty in collaboration with the *ArtiShock* contemporary theatre where actors unveiled portraits of people who contribute to urban littering.

The program's main emphasis was focused on online activities, one of which is an online school for volunteers that included live broadcasts with environmentalists, activists and opinion leaders, as well as ideas aimed at combating urban littering by young people.

A contest for the best idea to combat urban littering was held for final year university students in order to engage creative minds. The competition was divided into the following categories: *innovative projects*, *potential projects*, *socially significant projects*, and *educational projects*. As a result, about 30 ideas were collected and shared as recommendations for the local government. The best four ideas won financial grants for their implementation.

Among stand-alone online events, the campaign's timeline was full of eco-swap activities and challenges on a variety of topics - plastic-free shopping, separate waste collection, DIY Christmas trees, and trash tag challenges.



Banners on billboards/interactive panels

HEALTH PROTECTION AWARD: MEDTRONIC

THE MEDTRONIC MISSION

Medtronic's employees work every day to fulfill the Medtronic Mission — to alleviate pain, restore health and extend life. That Mission has fueled Medtronic's innovation, partnerships, commitment to integrity and ethics, and has resulted in the improvement of millions of lives. In the past year, Medtronic therapies improved the lives of 72 million people. That's two people every second of every hour of every day — and counting.

The global healthcare system faced an unprecedented challenge with the COVID-19 pandemic, and Medtronic responded in an unprecedented way. *First and foremost*, the global Medtronic took steps to help ensure the health and well-being of its more than 90,000 employees and their families around the globe. *Second*, the company mobilized its global resources to support patients and physicians in that time of need, including a rapid expansion in the production and distribution of critical products in the fight against COVID-19. *Third*, Medtronic has been partnering with key government agencies and providing direct support to communities around the world.

Medtronic is at the service of medical professionals and healthcare systems around the world. Since the start of the pandemic, the company has worked tirelessly to make critical products available to physicians and patients: working 24/7, reallocating our people to critical product manufacturing, and increasing our overall production for COVID-19-related products. Other lifesaving products — pacemakers, heart valves, brain stents, and insulin pumps among them — are always needed, and Medtronic continues to produce them.

Medtronic hosted dozens of virtual physician forums and medical education programs to help physicians of various specialties navigate the challenges of COVID-19. It deployed existing remote monitoring solutions and quickly developed new remote monitoring solutions to reduce potential exposure to COVID-19 for Medtronic employees, customers, and patients.

Medtronic is one of the leading manufacturers of ventilators, an important technology in the fight against COVID-19. A number of steps were taken to increase its own ventilator production to more than 1,000 per week, a five-fold increase from pre-pandemic levels, as well as to increase the total global market ventilator production and training:



- In an open-source initiative, the company released its *Puritan Bennett™ 560 (PB560)* Ventilator design specifications publicly, providing manufacturers around the world the ability to rapidly accelerate ventilator production. The company received more than 100,000 registrations for the design specifications for its PB560 ventilator.
- The company collaborated with *SpaceX* to manufacture a critical component for Medtronic's critical care ventilators.
- Medtronic partnered with other ventilator manufacturers, including *Dräger, GE Healthcare, Getinge, Hamilton Medical, Nihon Kohden, Philips, Vyaire Medical*, and others, to form the *Ventilator Training Alliance*, aimed at ensuring appropriate ventilator training for healthcare workers.
- The company committed to not raising ventilator prices as a result of the COVID-19 pandemic and was partnering with key government authorities to prioritize allocation to high risk/high needs areas.

In Kazakhstan, Medtronic works to ensure an uninterrupted supply of the products in high demand. During the pandemic we collaborated directly with the Ministry of Health to deliver the best ventilators to the hospitals in Kazakhstan. Medtronic employees continue to do their jobs delivering critical, lifesaving products to treat more than 70 conditions in the human body and supporting healthcare specialists with consultations.

COMMUNITY SERVICE AWARD (HEALTH PROTECTION): ExxonMobil

EXXONMOBIL HEALTHCARE AND EDUCATION SUPPORT FOR THE COMMUNITY

“Our greatest asset is our people. This is why investing in human capital is crucial for ExxonMobil. We remain committed to contributing to the development of communities where we work and live and to delivering their sustainable economic growth. I am confident that all our initiatives in healthcare and education – two building blocks for prosperity of any nation – will bring lasting benefits to the people of Kazakhstan.” – Dinesh Sivasamboo, Managing Director of ExxonMobil Kazakhstan.

ExxonMobil's healthcare and education programs are at the core of the company's community activities in Kazakhstan. Almost ten years ago the company started collaborating with the Atyrau region's healthcare administration by focusing on maternal and child health and reducing infant mortality. ExxonMobil supplied Atyrau and Mangistau regions' perinatal centers with the state-of-the-art medical equipment for nursing premature infants. Over 300 medical specialists have attended trainings on advanced neonatal practices.

Hospitals in the target regions have been furnished with the modern medical equipment which increases the survival rate of extremely low-weight premature newborns. Hospitals were also equipped with intensive care units with express blood analyzers to timely and reliably diagnose the conditions of young patients. The units have resuscitation tables, fetal monitors, and X-ray devices available.



Moreover, in cooperation with Atyrau and Mangistau regions' healthcare administrations, ExxonMobil contributed to addressing the issue of shortage of medical specialists by engaging young professionals



to work in regional hospitals and clinics. As part of this initiative, the company annually covers medical students' tuition for training in disciplines that are in high demand in the regions.

In the sphere of education, ExxonMobil has a long history of supporting science and education around the world. The world needs a talent pool that is able to meet future demands and address new challenges. It is important to inspire young people, especially young women, to consider and pursue careers in technical disciplines. ExxonMobil shares this belief and is committed to supporting *STEM*-related programs (*Science Technology Engineering Math*). For almost 10 years, we've been supporting talented children at the National Math and Physics school by sponsoring the *International Olympiad in Math and Physics*.

At ExxonMobil we also support a broad range of workforce development programs in host countries. Through participation in the Tengiz and North Caspian Sea projects, we develop employees to become the business leaders of tomorrow through extensive internal training and international development assignments at our operated assets — an essential way to develop a globally competitive local workforce and local supply chain.

The strong performance of the Tengiz, Kashagan and CPC oilfields is truly a reflection of the talented, capable and dedicated Kazakhstani workforce. We are proud to say that in the ventures we are involved in, over 90 percent are made up of national Kazakhstani employees.

HEALTH PROTECTION ACHIEVEMENT: BEIERSDORF/ RED CRESCENT

‘CARE BEYOND SKIN’ –THE BEIERSDORF COMMUNITY PROJECT

Beiersdorf's CSR project identified the most vulnerable social groups in Kazakhstan – the visually impaired in desperate need of support and care. That is why Beiersdorf and its partner, Red Crescent, decided to launch this joint project with the objective of training the visually impaired to use computers and smartphones in order to become independent and find opportunities for employment.

As part of this project, Beiersdorf established a training center at the Red Crescent facility where we can help people with vision problems to adapt to modern reality and become independent members of society. Anyone with impaired vision can receive training at the center.

A staff psychologist works at the center where classes are held along with competitions in computer literacy, learning how to use smartphones, and events of various types are organized: graduation ceremonies, nature excursions, and annual observance of the *International Day of Persons with Disabilities*. This helps our students acquire new skills, adapt to society, and make new friends.



The training center also provides broader access to literature and training materials in Russian and Kazakh. There aren't many Braille translations of literature and educational materials. As a result, teachers and parents need to read written materials out loud, thus making blind students and their assistants dependent on others to help them.

To empower visually impaired students, next year the training program plans to add working with audio files. This will both expand access to training materials and fiction, as well as give our students a chance to find new jobs and become independent professionals.

Everyone can contribute to this important social project. All you need to do is to buy any product of Nivea brand during the campaign to make the project sustainable. We will transfer KZT 30 from each purchase to provide care for those who need it.

In a world where loneliness often affects people's lives, the human touch and feelings, and closeness to others is of fundamental importance. That is why helping people has a special role for Beiersdorf. After all the Beiersdorf mission is *Care Beyond Skin* and so we will continue to provide support and further develop this program.



NUTRITION AND HEALTH ACHIEVEMENT: DANONE BERKUT

A NEW AND HEALTHY LIFESTYLE PROGRAM

On October 12 a press conference in Almaty marked the launch of a new and healthy lifestyle program for Kazakhstan's schoolchildren called *Healthy Nutrition from A to Z*. Working together with teachers and parents, the project will help children from elementary school instill healthy eating habits. The program's launch was attended by Ministry of Education officials from both Almaty and Astana, experts from the Kazakh Academy of Nutrition, school principals, program designers, a program blogger, journalists, and TV programs.

In the new academic year, schoolchildren of Almaty and Astana will begin learning about the *Healthy Nutrition from A to Z* approach, which in a friendly and interesting way tells children and parents that it is easy and exciting to eat delicious food and have a healthy lifestyle at the same time. The project is very relevant because an insufficient awareness of proper nutrition among children, parents, and teachers leads to an increase in the number of overweight and obese children.

Recent studies conducted by various international and government organizations among Kazakhstani school-age children have shown that every third illness is due to gastrointestinal problems and more than half of nine-year old children already suffer from obesity. For this reason, effective programs are badly needed in the elementary schools.

The program not only discusses the nutritional importance of dairy products, especially for young people whose bones develop as they themselves grow, but also the need to include fruit and vegetables and other healthy foods in a daily diet. To a certain extent, the program recommendations resemble the principles of a flexitarian diet in which 50% of its nutrients derive from plant-based foods and rest are from whole foods, dairy, and meat.

It is commonplace for children to crave fast food and sweets, which they consume when their parents are not there to stop them. This is often the case at school. However, if these foods are consumed regularly, they can lead to obesity, diabetes, osteopenia, and osteoporosis. It is hoped that after following this nutrition program, children will be better informed and more willing to switch to healthy eating habits. This is one of the primary program goals.



The *A to Z* program not only stresses the importance of dairy products in diets - especially for young people whose bones develop as they grow - but also the need to eat fruits and vegetables and other healthy foods. In a way, the program resembles and recommends the principles of a flexitarian diet with 50% of nutrients derived from plant-based foods and the remainder coming from whole foods, dairy, and meat.

It is common for children to crave fast food and sweets, which they tend to eat when their parents are not around to stop them. We see this occurring in schools. However, this eating pattern can lead to obesity, diabetes, osteopenia and osteoporosis. We hope that after learning about the *A to Z* program, children will be better informed and more willing to switch to healthier eating practices. This is the goal we hope will be achieved by the program.

The *A to Z* program will be taught at school as an elective subject, but its further advantage is the opportunity to go through all the lessons with parents at home in the online format on the web portal – www.interneturok.ru.

Nazgul Bibolova, Deputy Director, Almaty Department of Education, said in support of the program:

"We have been successfully cooperating with Danone for several years in launching interactive training courses for schoolchildren. When a team from Kazakhstan offered to work with us on a nutritional education program, we enthusiastically accepted this proposal. For the Kazakhstan project in particular we have created a landing page for hosting interactive lessons – you can choose and open any

of them as you see fit. Each contains illustrations and some are supplemented with interesting videos, tips, crosswords and tests. We are now actively working on downloading lessons from the program."

Yuri Grebenyuk, Director of Production and Education, adds: "In total, there will be 34 elective lessons on the A to Z landing page for schools. Lessons 9, 26, and 34 are already available today, and the rest will be uploaded in the near future," (interneturok.ru).

Tiago Carneiro Dos Santos, General Director of Danone Berkut, sums up the Danone objective: "As a socially-oriented business directly related to promoting healthy food products, Danone Berkut initiated design of the A to Z educational project with support from Kazakhstan's Ministry of Education. With Danone's assistance, the working group of the Almaty Education Department, together with the Kazakh Academy of Nutrition, developed a fully-fledged elective course for 4th grade students."

"One of the main advantages of this project is that a completely new approach to motivating a child to switch to a healthy diet is involved. The course is interactive, which is important and interesting for children. By providing students with knowledge about



healthy nutrition, we are creating a healthy generation that will grow into successful future citizens! We would like to see this project developed and taught throughout Kazakhstan."

At the end of the conference, a Memorandum of Cooperation was signed between Danone, the Almaty and Astana Education Departments, and the Private Educational Association to develop projects aimed at popularizing healthy nutrition and organizing informative events and activities. The *Healthy Nutrition from A to Z* project is intended to be scaled up and implemented throughout Kazakhstan.



TEAMWORK IS ESSENTIAL: SCIENCE ALWAYS WINS

THE URGENCY OF THE PANDEMIC

In confronting the COVID pandemic crisis from the early beginning we believed science would win and it did. It does. Science wins. Our experience at Pfizer has been a lesson in undertaking 'moonshots'. Setting big, bold goals even when they are intimidating and focusing on what matters most, working as a team and, finally, accomplishing what no one thought was possible - developing the COVID-19 vaccine.

Our success is about the fact that science can and does win, no matter how big or difficult the challenge may seem. In the face of the pandemic we were motivated above all else, by the potential and obligation to save lives. We knew that every day without a vaccine and treatment, lives were lost, and people around the world continued to suffer. Focusing on the outcome - knowing that saving lives was what mattered most - helped see us through the pandemic.

Patients are not data points. Every patient is a person, and every person has a story. They are someone to somebody - a mother, a sibling, a friend. When COVID-19 hit, we felt we had an obligation to use the science and technology we had at the time to find a solution. Each person affected by COVID-19 was worth saving, and we were motivated to protect as many as we could.

Stories about people suffering from COVID-19 are not just stories with a case number. These are stories of real people who experienced a real illness, real pain. So to us, each COVID-19 case was not just a number. It was a person, and every person deserves the chance to be seen, heard, and cared for.



Time was essential for the success of this project. When a team is asked to get a 10 year project done in 8 years they may find it challenging, but they will try to resolve the challenge. If they are asked to produce three hundred million doses instead of the regular two hundred million, our annual capacity at that time, they will find it hard but will investigate solutions to improve the process to deliver the results requested...

Our team was not asked to conclude a project that normally takes 10 years in 8 years. We had a challenge of getting it done in eight months. We didn't ask the team to make three hundred million doses. We asked them to make three billion doses. It was clear from the beginning that incremental improvements would not make the cut. We needed to completely rethink the processes.

At Pfizer, our success stems from the way colleagues embraced our purpose to create breakthroughs that change patients' lives at every level of the company. We imbue this in everything we do by asking ourselves three critical questions:

- **Am I being true to my purpose?** When you align around purpose, you are sending very clear guidance to an organization with multiple layers.
- **Have I aimed high enough?** Setting goals that are very aspirational and can unleash human creativity in phenomenal ways. By aiming high, we can accomplish unbelievable things.

- **Do I have the right mindset?** Every member of our team answered these questions affirmatively during our quest to make the impossible possible. Now everyone in the company also wants to pursue a moonshot for their area of human health. We dream of a future when a host of diseases will become preventable or treatable. All of us are impatient, especially now that we know what's possible.

We embarked on an ambitious task—one that was made even more daunting by the billions worldwide who were watching, waiting for answers, and praying for a return to normalcy. It was not a time for ego—we all knew this was an effort that no one could handle alone. It required a certain humility. We had to trust and empower one another and encourage open dialogue and free-flowing ideas.

This was truly a team effort that took extraordinary time, focus, and courage to speak up. Early anxiety amongst our team was soon replaced by passion, as we embraced the importance of our mission and the challenge of our “just-in-time” mentality.

We were also motivated by the urgency of the pandemic. We knew that a vaccine would mean millions of lives saved and for millions of stories to continue. How many people would see a daughter's graduation or a son's wedding because of a vaccine? How many children, children, friends, professionals around the world would continue to paint their own stories? We wanted to see as many as we could.

For quite some time pharmaceuticals were seen by many as an industry was seen as an industry with one of the worst reputations. Our hope is that we can now deepen our understanding of the collective good

that our industry can bring, especially when we come together for a joint effort. The success of our vaccine wasn't just due to Pfizer scientists. We had high-level partners around the world: starting with the brilliant team at BioNTech who enabled the success of this effort.

There were 46 000 people that volunteered for the trial. There were scientists, manufacturing sites workers, colleagues overseeing the vaccines' delivery and governments around the world who trusted science and ensured the vaccine was available to protect their people. Developing, manufacturing and delivering this vaccine to patients was truly a team effort, and I hope that that the spirit of collaboration is what people remember about its development.

Pfizer Central Asian Republics, Caucasus & Mongolia (CauCAR) delivered the *Pfizer* and *BioNTech* vaccine - one of the most essential tools in fighting the pandemic to the region, supporting the roll out of the vaccination programs, despite numerous challenges that differed from unclear national vaccination plan as recommended by WHO to a number of logistic barriers. In this journey Pfizer's long-term partnership with the Government of Kazakhstan and the joint effort resulted in achieving an understanding with the healthcare decision makers on combatting the pandemic through a multisectoral approach which was critical to saving lives of people of Kazakhstan.

Since the beginning of the pandemic more than 650 million people were infected by COVID-19 around the world, which caused more than 6 million deaths. More than 5 billion people worldwide have received a COVID-19 vaccine in an effort to fight the pandemic back and save the lives of our loved ones and for their stories to continue being written.



COMMUNITY SERVICE AWARD (COMMUNITY PARTICIPATION): EURASIA FOUNDATION OF CENTRAL ASIA (EFCA) / TCO

INCREASING COMMUNITY PARTICIPATION IN LOCAL DECISION-MAKING

Participatory planning involves citizens, local authorities, and business in creating public spaces, such as parks, playgrounds, or sports areas. This kind of cooperation makes it possible to create new public spaces in villages or large cities and demonstrate to local residents the value of their contribution to solving public problems and improving the quality of life. This is precisely the approach taken by the Eurasia Foundation of Central Asia team in the *Qogamdyq Kenistikter* program, which has been implemented since 2018 with the support of Tengizchevroil.

For four years, the EFCA team has been supporting local communities of Atyrau and Mangystau oblasts in improving over 150 public spaces, including parks, playgrounds, centers for kids with disabilities and medical rooms, improving and greening the territories of schools and kindergartens, lighting streets, and building a pedestrian bridge – used by more than 40 000 locals. That's why the *Qogamdyq Kenistikter* received an AmCham-2022 nomination "Community Service Award (Small Companies/ NGOs)".

EFCA launched the *Qogamdyq Kenistikter* project in 2018 with the support of Tengizchevroil, understanding that infrastructural problems in the region must be solved at a systemic level and first and foremost by changing people's consciousness. We understood that this was a difficult task, but the main goal of the project was to allow residents to be more responsible and collectively involve in discussing and solving local problems. While the community built 10 public spaces in the first year, this year the number of new public spaces has grown to 66. In these four years of work, the number of users of the newly built public spaces has exceeded 40 thousand people, and the number of project participants has exceeded 1700.

Of course the main result is the belief of project participants that everyone can take responsibility for their well-being. It corresponds to the vision of Eurasia Foundation of Central Asia which is embedded in all our projects in areas of organizational development of NGOs, social entrepreneurship, support of socially vulnerable groups, development of education and work with youth, and development of civil society in Kazakhstan and wider Central Asia.

The success of the *Qogamdyq Kenistikter* project was highly dependent on local people's needs and their active citizenship. Understanding this, EFCA

and TCO developed a project that allows people to obtain basic knowledge on how to improve their neighborhood, cooperate with the community and then with the help of mini-grants build new public spaces facilities. Speaking further about the project's work mechanism, it looks like this: first, we hold training on project design and management, then the community sends us applications with ideas.

After the Selection Committee decides, the initiative groups, guided by the leaders, receive mini-grants and proceed with their projects. If four years ago residents wanted to create facilities for individual use, today they are proposing projects that all residents can use such as playgrounds, parks, sports fields, crisis centers, and so on. With the facilitation from our team, people began to understand that it is possible to jointly improve the quality of life of an entire village, district or city.

As the leader of the mini-project in Atyrau, Olga Kurasova said "At the beginning of the project, I could not understand, how should we build playground without any skills and knowledge, but after the trainings we were ready to start without any concerns and our initiative group did the best and has built absolutely new playground which is every day full of playing kids."



One striking example of a collective solution to a long-term problem is the bridge constructed in the village of *Shokpartogai*. The hollow used to fill up with water each autumn and spring, and local residents and children had to walk through deep puddles to get to school. A local leader from the village gathered all concerned residents and proposed building a bridge. The budget of the project was not enough, so residents collected the missing amount with the help of crowdfunding and built it. Today this bridge allows children, women, people with disabilities and the general public to safely cross to the other side.

The contribution of the local community to the project also plays an important role, as it shows people's involvement, personal care, and responsibility. Now community input amounts to more than 40 million tenge. Residents are not only engaged in crowdfunding but also in crowdsourcing, using their time and skills voluntarily. We are very proud of such projects as the bridge in *Shokpartogai* because it is a great example of local community groups in improving the quality of their lives in partnership with local authorities. For example, today local authorities in the villages of Mangistau and Atyrau oblasts turn to local activists for recommendations when they analyze which problem must be solved.

The example of *Qogamdyq Kenistikter* shows how important it is to cooperate not only within society but also at different levels: with local authorities, non-governmental organizations, and business. For example, if we provide training to initiative groups and help throughout all stages, the *akimats* assisted in the implementation of projects in all villages and the city of Atyrau, including material assistance, providing equipment, for some projects installing lighting at their own expense, helped to gather volunteers where needed.

Of course, this project would not be possible without our donor, *Tengizchevroil*, a leading company in Kazakhstan that produces oil, gas and associated products that fuel the modern economy. The TCO *Community Investment Program* allocated \$2.3 million in 2022 to social projects that create long-term opportunities to drive economic development and ensure the availability and quality of education and healthcare. Tengizchevroil has not just invested in this project but has always been fully involved in its implementation.



If we encountered any difficulties, the Tengizchevroil team always came to our aid, provided additional funding if necessary, and provided expertise. Representatives of the company attend every new site opening. Our project participants always know

that they can openly share their experiences with them and count on their support. It's great that through our joint efforts we can help people believe that they can make positive changes in society through their own efforts.

Over the course of four years, the Eurasia Foundation of Central Asia team has watched the *Qogamdyq Kenistikter* program increase the awareness of local residents to take responsibility for their well-being and be more proactive in addressing their community's problems.

It's important to note that not only did we help the participants, but they helped us as well. Thanks to this project, we realized that the contribution of non-governmental organizations to the development of society is very important. We understand that young nongovernmental organizations face challenges, so we work with them as well. For example, in our project "*Advancing the capacity of women rights NGOs Online Program*", which EFCA implements in cooperation with *FemAgora* with the support of the Embassy of the Netherlands, we train young organizations and initiative groups from Central Asia in organizational development, provide mentoring and coaching support, as well as flexible mini-grants, which can be spent on salary fund, project or other strengthening of their human right activities.



As an organization with a great history and experience, EFCA sees that training of young non-governmental organizations is necessary for the development of internal expertise and implementation of innovations in social projects. EFCA was honored to receive the AmCham Award from Nout van Woudenberg, Deputy Ambassador of the Embassy of the Netherlands.

The *Qogamdyq Kenistikter* program is an excellent example of how communities can cooperate with NGOs, socially oriented business, and local governments to improve the common good. As a team, EFCA is very grateful for this experience. We believe that only cooperation and the sincere involvement of all stakeholders leads to the sustainability of social projects.

MOST INNOVATIVE EDUCATION/ TRAINING PROGRAM: SHELL

SHELL NXPLORERS: HUMAN CAPITAL DEVELOPMENT BY POWERING YOUTH

The world is becoming increasingly connected and so too are the challenges. The skills we need are rapidly evolving. The oil and gas industry and its new initiatives and our world need talent that can think differently, navigate new complexities, see opportunities, and build sustainable solutions. The challenge is not only to close skill gap, but to help bridge the opportunity gap, thereby supporting an inclusive energy transition where no one is left behind.

That is why human capital development holds a special place in Shell Kazakhstan's day-to-day operations and its social investment portfolio. It is particularly worth noting that considerable attention is directed towards supporting talented young people by enhancing their potential so that they can improve their competencies and skills crucial for future employment.

"Driving changes in the energy system require clear purpose and bold actions. Change needs to happen at pace with passion and determination. All common characteristics in the younger generations. They have wonderful ideas, enthusiasm and good understanding of challenges faced by the planet and society. We feel privileged helping them unlock their potential through our NXplorers program", said German Burmeister, Senior Vice President and Country Chair of Shell Kazakhstan.



We understand that as we progress in our ambition to provide more and cleaner energy to the world, not everyone will be equipped to move through the energy transition at the same pace due to complex societal challenges. That is why our goal is to bridge the opportunity gap and support an inclusive energy transition. For this purpose, Shell developed



the *NXplorers* program, our flagship Global STEM program that equips young people with the tools, skills, and a new way of thinking to transform themselves, their communities and their world.

Our support for STEM aims to help young people develop complex, creative thinking needed to bridge the skills gap for the future, helping them build sustainable solutions to global issues. *NXplorers* focuses on developing STEM habits such as *Creative problem solving, Critical thinking, Collaboration and Communication*. These are transferrable skills that will always remain relevant and define success regardless of which industry they have chosen for employment. The same skills have been identified among the top ten professional skills needed in 2025 by the *World Economic Forum*.

NXplorers connects education and application, equipping young people with the tools to apply their learnings and make their ideas real. It promotes STEM and STEM thinking, underscored by principles of inclusivity, diversity and fairness. The program prioritizes underserved communities and promotes female participation so that talent meets opportunity.

At the heart of *NXplorers* is a facilitated workshop that can be run in schools, universities and learning centers where young people and their teachers build their confidence to embrace complexity through real world issues. In the workshop, young people are asked: "What problem do you want to solve?" and by exploring issues, creating future scenarios, they learn new tools and methodologies to create positive change. It is a well thought-through methodology comprising three phases, twelve tools, case studies,

videos, a collaboration website, and an on-line learning and collaboration platform.

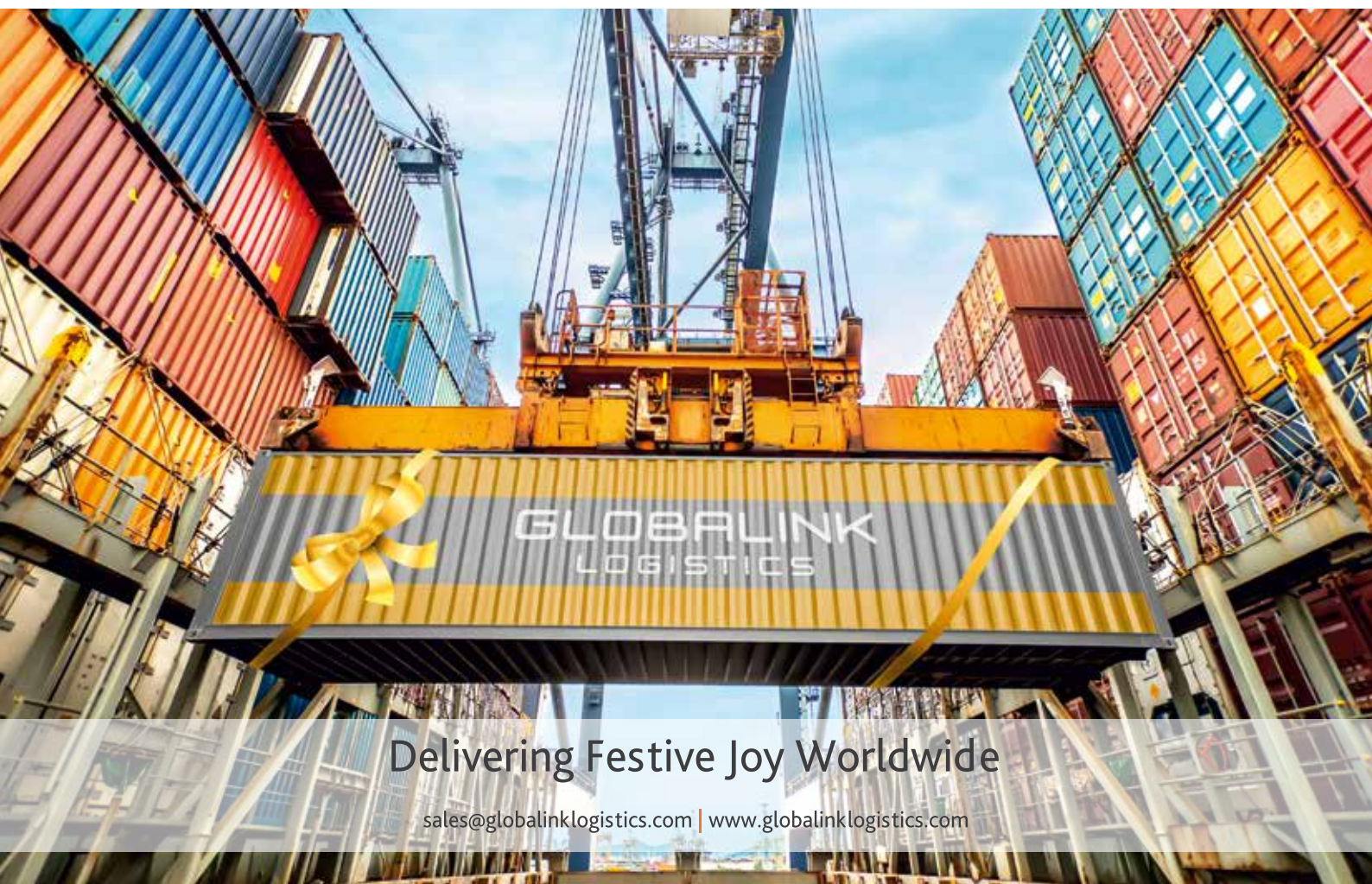
NXplorers is a truly global program, reaching over 150,000 students across twenty countries since 2018 (refer to www.nxplorers.com). In 2021 the *NXplorers* evaluation report highlighted the positive impact the program is having on students and teachers.

83% of our students reported they felt they had improved their thinking skills, and 79% of teachers felt they had improved their teaching skills. We believe these outcomes will help young talent become more motivated in choosing a STEM discipline in the future and more successful in applying for jobs in our industry, which in turn will help us bridge the talent gap.

Shell *NXplorers* in Kazakhstan is part of several social projects such as *Student Energy Challenge* and *Student Energy Challenge – Junior, Solar for Schools*, and the *Green Generation Contest* in a pilot project for schoolchildren of West Kazakhstan and the Atyrau regions. To date, over 1600 Kazakhstani students and 800 teachers have been trained in *NXplorers*.



As one of the key players in the oil market of Kazakhstan, which will celebrate its 30th anniversary next year, Shell Kazakhstan tirelessly continues to extend and improve its social investment portfolio. Every year new projects are born in various areas in keeping with the country's socio-economic needs. For this purpose, every three years Shell Kazakhstan develops its strategy for voluntary social investments. The strategy includes a set of action projects to develop small and medium entrepreneurship, support self-employment and employment of people from vulnerable social groups, develop STEM projects, and promote best practices in road safety.



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SUPPORT FOR KAZAKH CULTURE AWARD: EY

BRINGING VIEWERS TO CLASSICAL MUSIC AND THE VISUAL ARTS

EY has always supported the development of art and culture, and for the last three years, the company has been a permanent patron of the *Kasteyev Museum of Arts*. During the pandemic, which led to the application of advanced technologies, EY supported the *GATOB* project together with the *Abay State Opera and Ballet Theatre* in Almaty to introduce virtual reality.

"When the pandemic began, we realized that we might suddenly find ourselves locked inside four walls, without access to cultural organizations, cut off from social communication, and without access to the traditional and customary exchange of cultural knowledge. In essence – forced isolation at home.

So we thought how good it would be to still be in society but without exposing ourselves to danger. This was how the Orchestra VR project was born. This project allows you to fully take part in the process and improve your skills, or you can simply watch the performance as a spectator," stated Tair Karimov, Deputy Director of Artistic Services at GATOB at the time of the project's launch.



Of course, the project has not been without its difficulties. The Abay Theatre staff had to adapt quickly to the new working conditions, but the team managed this task very well. According to Tair, the content developed by the theatre is technologically years ahead of the industry, which is evident in the quality of the content that can be compared to the best glasses in the world from Facebook *META* that can deliver 8K resolution!

The remarkable thing about the project was that the Theatre's musicians were able to rehearse and learn together with a virtual orchestra, which is much more difficult to achieve and plan in real life. Moreover, viewers could watch classical music concerts, opera, and ballet wherever there was an internet connection.

To strengthen the project's educational component, information about it was sent to many educational institutions, industry professionals, and art lovers in different countries. People asked for more details about the project (*What is VR? How can VR contribute to the development of the arts? Where and how can I see the performances?*). This is not surprising, because the VR industry is not yet highly developed and needs to be explained, especially when it is in synergy with classical music that has an educational character.

Musicians rarely have the opportunity to perform as soloists with an orchestra; however, preparing a large-scale piece (a soloist performing with an orchestra) is an integral part of the student's programme. It is impossible to satisfy the students' need to perform with an orchestra because there are too many students and not enough orchestras. Therefore, the orchestras are replaced by accompanists. The GATOB team has combined technology with classical music to solve the problem of millions of musicians across the planet.

"Our statistics show that the vast majority did not understand the project at all when we first contacted them. Even after an initial phone call, detailed instructions, and a very clear video clip about the project, we still had to call people back and explain everything via video. Only after that did people say: "Oh, now I see", "Wow, we didn't know you could do that. Cool!", "Just like that, with an orchestra! Won't I fall off the stage?!", "Guys, this is great!" and so on," explained Tair.

At a time when everyone was thinking about the Metaverse and its diversity, we decided to expand the project and allow everyone who does not have the opportunity to experience high culture.

Busy work schedules, business trips, or working in another country or city far from your favourite theatre often prevent you from attending your favourite ballets, operas, and soloists' performances. This makes the *Orchestra VR* project an excellent alternative to visiting the theatre.

The viewer can be at home, on holiday, in the airport lounge before departure, or anywhere. All you need is the internet. The viewer is offered content in 3D and stereoscopic sound (when you turn your head to one side and the other, the sound will come from a specifically defined point). All these effects make the project unique and foster the alternative development of cultural events.

We were waiting for the right moment, and it has come thanks to the pandemic. The project further developed into a social project with viewers from low-income families and children from orphanages.

Life is short; art is eternal

"Experience art from home" – our firm was directly involved in bringing this idea to life.



During the pandemic, *GATOB* continued its work and also actively created premiere performances and online programmes. This has delighted regular theatregoers and attracted new audiences.

GATOB's virtual guests had the opportunity to enjoy works by Abay, Brahms, Haydn, Mozart, Beethoven, Rachmaninoff, and Zhubanova. We are delighted to be part of such a large-scale project. This means that anyone, regardless of location, can experience the masterpieces of the world's classical music heritage for free, 24 hours a day, 365 days a year.



THANKSGIVING 2023 – GRATITUDE AND JOY FOR THE GIFT OF GOOD HEALTH

The Annual AmCham Thanksgiving Celebration was held on Friday evening, 25 November, at the InterContinental Hotel in Almaty. The InterContinental Hotel has been the AmCham first choice for a traditional Thanksgiving meal for many years. A pre-Dinner Cocktail with mulled wine and Apple City Cider took place outside the Ballroom, and then at 8pm the Ballroom doors were opened and everyone took their seats. A Welcome was delivered by Caroline Savage, the U.S. General Consul, and Dinner began.

Families with children attended, as did colleagues and friends at large corporate tables. The Thanksgiving feast was abundant, the live music performed by Jazz Session and their singer Irina was a great mood-setter, and everyone waited eagerly for the Lottery after Dinner. Children gathered around the podium to choose the winning Lottery tickets for a broad array of gifts – above all, the tickets to London from Air Astana and tickets to any chosen destination in Turkey from Turkish Airlines.



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THE 2022 AMCHAM AWARDS GALA – ACHIEVEMENT AWARDS FOR MEMBERS

On October 29, the Black Tie Awards Gala was held at the St. Regis Hotel in Astana. U.S. Charge d'affaires Judy Kuo presented the U.S. Ambassador's Award for Best Contribution to U.S.-Kazakhstan Relations, to begin the Awards Ceremony. The Awards that followed were presented by Ambassadors Alan Hamson (Canada), Kathy Leach (U.K.), Soili (Finland), Marco Alberti (Italy), Kestutis Jankauskas (E.U.), and Manal Elshinnawi (Egypt), DCM Nout van Woudenberg (The Netherlands), and Trade Commissioner Eric Dionne (Canada). The Award Winners were:

- **Best Contribution to U.S.- Kazakhstan Relations** - Madina Abylkassymova, Chairperson Agency for Regulation and Development of the Financial Market.
- **Executive of the Year** – Erlan Dosymbekov, EY Managing Partner
- **Women's Leadership** – Saule Zhakayeva, CEO, Citibank Kazakhstan

- **Entrepreneurship** – Alex Thomas, Founder and President, Apple City Cider
- **AmCham Service** – Donald Townsend, Founder and Advisor, Intellectual Property Working Group
- **Health Protection** - Medtronic
- **Excellence in Innovation** – Eurasia Group
- **Environmental and Safety** – Metro Cash & Carry
- **Education/ Training Program** – Shell Kazakhstan
- **Support for Kazakh Culture** – EY Kazakhstan
- **Community Service (Large Company)** – ExxonMobil
- **Community Service (Small Company)** – Eurasia Foundation of Central Asia (EFCA)/ Tengizchevroil

Articles about each of the above Awards and Award Winners are published in the present Issue of *Investors' Voice*.



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ADVOCACY UPDATE OCTOBER – DECEMBER 2022

The AmCham Council sessions with the Prime Minister and Cabinet were delayed by the Presidential Elections in the autumn but resumed in November at Prime Minister Smailov's request. The topic for the November 30 Council was *Tax Policy and Tax Reform* in view of the number of tax concerns expressed by AmCham members in recent months. Tax will be revisited at the next Council session to focus on AmCham recommendations for the Government's revision of the Tax Code planned for 2023.

The November Council session began with a Welcome to newly arrived *U.S. Ambassador Dan Rosenblum*, followed by presentations by the other 3 Council Ambassadors (*U.K., E.U., Canada*), then two 'big picture' tax presentations by the Head of the *Asian Development Bank* and *EY Managing Partner Erlan Dosymbekov*, and finally by two tax/ royalty presentations from the CEOs of Beeline and Inditex. The customs/ royalties problem has been an recurrent issue since the first Council session 15 years ago.

The UK Ambassador's lead-in presentation focused on retrospective reinterpretations of contracts and sudden changes in tax rates. The recent introduction of a new *Mineral Extraction Tax* was a case in point, excessive due diligence and paperwork was also raised.

The Canadian Ambassador similarly stressed the *Mineral Extraction Tax* with reference to mining, an industry with a substantial presence for Canadian investment. The E.U. Ambassador discussed two proposed Tax Code amendments concerning corporate income tax deductions and passive income payable to related parties.

The *ADB Head of Mission* delivered a presentation stressing the Government's need to increase fiscal decentralization to improve income redistribution policies and lessen fiscal imbalances. The current system concentrates economic activity in certain parts of the country and limits opportunities to mobilize local potential, thus decreasing economic dynamism.

The *EY presentation* was a thoughtful approach to reconsider basic principles underlying Kazakhstan's Tax Code to draw on international practice. One issue is application of the *Double Taxation Treaty* to which Kazakhstan is a signatory and which is of particular importance to foreign investors. Other critical issues for Kazakhstan are social taxes and property taxes. These are only examples of certain portions of the Tax Code that need fundamental rethinking and adjustment to create a fairer Tax Code reflecting international best practices.



The final three presentations concerned Royalties, Customs, and Intellectual Property, as noted above. Royalties and customs issues are constants that have changed little over the past decade despite being frequently on the Council Agenda. The new element is the expansion of Intellectual Property with tax impact in the importing of goods and services.

AmCham has persisted in examining and presenting recommendations for all three issues, in particular Intellectual Property, for which an AmCham InterMinisterial Working Group was created ten years ago. As time passed, IP became increasingly important for all industry sectors, including consumer goods and electronic media.

The two companies that delivered Council presentations on the interface between IP and tax were Beeline and Inditex, one of the world's largest fashion retailers with a strong presence in Kazakhstan's shopping malls across the country. The fashion retailer had planned increased investment in Kazakhstan but is reconsidering due to the legal burden of litigation.

The November Council presented some serious challenges to issues that should be part of the revised Tax Code in 2023. Royalties should be dealt with, the *Mineral Extraction Tax* should be re-examined, the IP and tax interface requires clarification, and fiscal decentralization would benefit the general population.

AmCham has requested the return of the Prosecutor General to the Council, given the frequent legal challenges resulting from tax and other factors impacting on foreign investment.

The Prosecutor General attended the November Council, taking notes on the disputes under discussion, and the Prime Minister agreed to include the PG's presence at Council meetings in the future.



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WORKING GROUPS UPDATE

OCTOBER – DECEMBER 2022

Technology and Innovation

On-Line - Technology and Innovation Working Group

On September 27, the AmCham Technology and Innovation Working Group members met online on a MS Teams platform chaired by Sergey Leschenko, Microsoft Country Manager.

The purpose of the meeting was to determine the key issues for members. The participants discussed last season's topics and summed up the results. Over the past season, the Group focused on cloud storage, education, and new technologies in the oil and gas industry, actively working with the Digitalization Regulator of the Kazakhstan Ministry of Digital Development.

The main focus for the new season will be Banking, Cybersecurity, O&G, and Telecoms. The participants decided to increase communication with the Regulator and organize more meetings to determine further steps to develop Kazakhstan's technology industry.

On-Line - Technology and Innovation Working Group

On 1 November 1, the AmCham Technology and Innovation Working Group met online, chaired by Sergey Leschenko, Microsoft Country Manager. The Guest speakers were Microsoft Excel Expert and author of Excel courses in *DataBoom.kz* - Veronika Mironova, and Ruslan Khabibulin, an IT architect from SoftwareONE Kazakhstan. Agenda topic was "Innovations in Security for Front-line Staff".

Millions of home users and businesses rely on Microsoft Excel to track their expenses and income, plan their budgets, and perform almost any calculation-related tasks. This program may also be subject to a cyberattack. The problem is that such attacks are very complex and difficult to detect. Attackers can embed malicious content in a separate data source and then upload it to a spreadsheet when it is opened. Malicious code can be used to remove and launch malicious programs that can endanger a user's computer.

One of the options to protect an Excel file is to use *Format.XLSB*. There are three levels of file protection: the file, the workbook, and the sheet levels.

Ruslan Khabibulin's presentation focused on the *Enable Frontline Workshop* issues. There are certain challenges at the forefront: geographical dispersion of employees and scattered communications, lack

of high-quality involvement and high staff turnover, inefficient adaptation, outdated skills, and knowledge gaps.

One tool for everything: from sharing corporate news via Live Events to training and creating a single platform for work. MS Teams contributes to the efficiency and flexibility of front-line staff by automating service processes and tasks through applications and automation. MS Teams can help increase employee flexibility and responsiveness with the Walkie-talkie feature. Improve coordination between business tasks and employees using the Tasks function. Optimize business processes with the help of analytical data and automation of routine tasks using Power BI and the Power Application.

On-Line Technology and Innovation Working Group

On November 29, Technology and Innovation Working Group members met online, chaired by Sergey Leschenko, Microsoft Country Manager. The Guest speaker was Kamila Butasheva, Director of Partnership Development, *DataBoom.kz*, who addressed the topic *To BI or not to BI? Is Excel enough for data analysis, or does your team need PowerBI?*

DataBoom.kz is an online data analysis school that consults and trains data analysis skills: *Power BI, SQL, PYTHON, EXCEL*. Data Scientist processes and analyzes big data arrays to find new connections and patterns using machine learning algorithms and build a predictive algorithmic model that can solve business, science, and everyday life problems.

Excel is an effective and versatile tool for any analytics task. Combine it with Power BI to get extensive data analytics and visualization capabilities. Easily collect, form, analyze and study key business data, applying new approaches and spending less time by combining these applications. Display various information, charts, and tables, as well as other objects, together with data from other sources on the Power BI dashboard by connecting Excel workbooks to Power BI.

Intellectual Property Rights (IPR)

Intellectual Property Rights (IP) Group – InterMinisterial Working Group

On November 4, the Intellectual Property Rights Inter-Ministerial Working Group met online, chaired by Adilet Nazarbayev, Branch Head, Johnson & Johnson, and Group Advisor Donald Townsend, Senior Commercial Officer at the U.S. Consulate.

The Working Group members discussed the results of the meeting with Deputy Minister of Health Zhandos Burkittbayev, in which questions and proposals were presented regarding IP pharmacology protection. It was decided to request a round table with the Ministries of Health and Justice to discuss treatment protocols, national registration of medicines, regulation of medical devices and equipment, and protection of IP rights.

Intellectual Property Rights (IP) Group – InterMinisterial Working Group

The Intellectual Property Rights Inter-Ministerial Working Group met on December 12 chaired by Adilet Nazarbayev, Branch Head, Johnson & Johnson and Group Advisor Donald Townsend, Senior Commercial Officer at the U.S. Consulate. The Government was represented by Deputy Minister of Justice Akerke Akhmetova, IP Rights Department Director Yermek Altynbekov, IP National Institute Director Erbol Ospanov, IP Rights Department Deputy Director Gulnara Kaimuldina, and Kenzhebek Tuleshev, Head of the Medical and Pharmaceutical Control Committee.

The Government speakers discussed steps to be taken in IP rights in 2023. Kazakhstan has developed a Roadmap to strengthen intellectual property by creating a technology and innovation support center modeled on the *World Intellectual Property Organization*: development of a mechanism for subsidizing international patenting within the framework of innovation support projects, increasing state support for universities and research institutes in terms of research funding, and training inventors for commercialization of inventions.

The AmCham Group presented proposals for protecting IP rights in pharmacology, specifically registration of medicines, pointing out contradictions in EEC regulatory acts.

The problem of prolongation and revision of national clinical protocols was also presented. The current list of strategically important medicines is based on ATC codes with classifications up to level 5, which will significantly limit access to innovative therapy.

The Ministry of Justice agreed with the AmCham proposals and promised to study them carefully. The Ministries of Health and Justice promised to continue to work together, with the next AmCham meeting scheduled in January 2023.

Corporate Social Responsibility (CSR)

Almaty/Atyrau OnLine Corporate Social Responsibility (CSR) Working Group

On October 5, a joint meeting of the Almaty/Atyrau CSR Working Group met online, conducted by Thomas Jose, Beiersdorf General Director for Eurasia. The speaker was *David Maghularia, Managing Director, Inditex Kazakhstan*, who addressed the topic, “*Inditex Sustainable Development Strategy*”. Inditex is the world's leading international retail chain representing brands such as *Zara, Zara Home, Massimo Dutti, Bershka, Stradivarius*, and others. It operates numerous retail stores in Kazakhstan employing roughly 1000 retail staff.

Inditex is an agent of change. Over the past two decades, Inditex has demonstrated a longstanding commitment to people and the environment, beginning with signing the *UN Global Compact* in 2001. Many of the social, economic, and environmental challenges we all face are now more urgent than ever. The impact of climate change, the human influence on the natural world, and a scarcity of natural resources impacts all people.

The company aims to generate a positive impact for the more than three million people working at non-exclusive suppliers and factories that produce for Inditex: for their communities and ecosystems span 40 countries, and for the broader fashion industry.

Corporate Social Responsibility (CSR) Working Group

On December 1, CSR Working Group members met online, chaired by Thomas Jose, the Beiersdorf Eurasia General Director. Speakers were Red Crescent Fundraising Coordinator *Karina Tlepova* and Fundraiser *Dariya Gabdykalikova*. Topic was “*Red Crescent Achievements and Plans for 2023*”.

The Red Crescent of Kazakhstan is part of the International Red Cross and Red Crescent Movement. For 85 years, they have been helping people in difficult situations throughout Kazakhstan, which makes them the country's largest humanitarian organization employing 3000 volunteers, 76 employees, through 18 branches. Red Crescent prioritizes *Emergency response/ Disaster risk reduction, First Aid Training, Prevalence of Socially Significant Diseases (including Covid-19), Promoting Blood Donation, Tracing Services, Social Assistance to Vulnerable Groups, and Assistance to Refugees and Asylum Seekers*.

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Email: knodia@ge.qatarairways.com
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Qatar Airways is the state-owned flag carrier airline of Qatar. Headquartered in the Qatar Airways Tower in Doha, the airline operates a hub-and-spoke network, flying to over 150 international destinations across Africa, Asia, Europe, the Americas, and Oceania from its base at Hamad International Airport, using a fleet of more than 200 aircraft flying to over 173 destinations. Qatar Airways Group employs more than 43,000 people. The carrier has been a member of the *Oneworld* alliance since October 2013.

Since its founding in 1997, Qatar Airways has earned numerous awards and has been included in the circle of elite global airlines that have received a five-star rating according to Skytrax. Qatar Airways became the 'Best Airline in the World' according to Skytrax in 2011, 2012, 2015, 2017, 2019 and 2021. In addition to First Class and Business Class, Qatar Airways offers Economy Class and was named 'Best in the World' in the 2009 and 2010 Skytrax Awards. It also operates a corporate jet service.



Delta Air Lines

CORPORATE A

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Regional Manager
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NO ONE BETTER CONNECTS THE WORLD

More than 4,000 Delta Air Lines flights take off every day, connecting people for travel to more than 275 destinations with a commitment to industry-leading customer service, safety and innovation. Delta's team of 90,000 global professionals leads the way. Powered by innovative and strategic partnerships with Air France-KLM and Virgin Atlantic, Delta brings more choice and competition to customers working toward more sustainable aviation by leveraging existing solutions and technologies, investing in the future of sustainable aviation fuel, and engaging with next-generation solutions.

Delta is America's most-awarded airline thanks to the dedication and professionalism of its people recognized by Fortune, the Wall Street Journal, and Business Travel News, among many others.



TOYOTA MOTOR KAZAKHSTAN

CORPORATE A

John Andrew Thomson
President

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www.lexuskz.com

Toyota is a leading multinational automotive manufacturer headquartered in Toyota City, Aichi, Japan. It was founded by Kiichiro Toyoda and incorporated in 1937 and is one of the largest automobile manufacturers in the world, producing about 10 million vehicles per year.

Toyota Motor Kazakhstan is a subsidiary of Toyota Motor Europe. The company was founded on May 20, 2008 in Almaty and began operating January 1, 2009. As an official distributor, Toyota Motor Kazakhstan is responsible for Toyota and Lexus national brand marketing in Kazakhstan and Kyrgyzstan. To date, the official Toyota and Lexus dealer network includes twenty dealerships in more than 16 cities.

As of 2022, Toyota produces vehicles under four brands: the namesake Toyota, Lexus, Daihatsu, and Hino. The most popular Toyota fleet models in Kazakhstan and Kyrgyzstan are Toyota Corolla, Toyota Hilux and Toyota Land Cruiser Prado.





VALMONT INDUSTRIES

CORPORATE A

Stephen Kaniewski
Global President and CEO

Kevin Meusch
General Manager, Kazakhstan

Baikanur Business Center
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Almaty Kazakhstan

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Website: www.valmont.com

Valmont Industries is an agricultural company founded in 1946 in Omaha, Nebraska, where its corporate office and main plant continue to be based today. It is a large, publicly held manufacturer of irrigation equipment, windmill support structures, lighting and traffic poles and steel utility poles. Valmont's worldwide locations include Europe, China and India with an office and operations in Kazakhstan.

Valmont is a publicly traded company on the New York Stock Exchange (NYSE) under the symbol VMI. It is a component of the S&P 400 and employs 9,800 staff.

In April 2010, the Valmont charitable foundation committed \$50 million to the University of Nebraska to establish the *Global Water for Food Institute*. The Institute's multi-campus center for research, education and policy analysis facilitates solutions to the challenges of hunger, poverty, farm productivity and water management.

Mon'delēz Kazakhstan

CORPORATE A

Oleh Savchuk
Country Director

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Website: www.mondelezinternational.com

Mondelez International, is a multinational confectionery, food, holding and beverage and snack food company based in Chicago. The company has its origins as Kraft Foods, founded in Chicago in 1923. The present enterprise was established in 2012 when Kraft Foods was renamed Mondelez and retained its snack food business, while its grocery business was spun off to a new company called Kraft Foods Group.

The Mondelez International company manufactures chocolate, cookies, biscuits, gum, confectionery, and powdered beverages. In 2014, the company announced a merger of its coffee business with the Dutch firm Douwe Egberts.

Mondelez has an annual revenue of about \$26 billion and operates in approximately 160 countries.[5] It ranked No. 108 in the 2021 Fortune 500 list of the largest United States corporations by total revenue. Global employees number 79,000 as of December 2021. The Mondelez global Chairman and CEO is Dirk Van de Put.

Thunderbird WorldWide Kazakhstan

CORPORATE B

Violetta Sireyeva
General Manager

Success Business Center
20A Biokombinat Street
Almaty, Kazakhstan

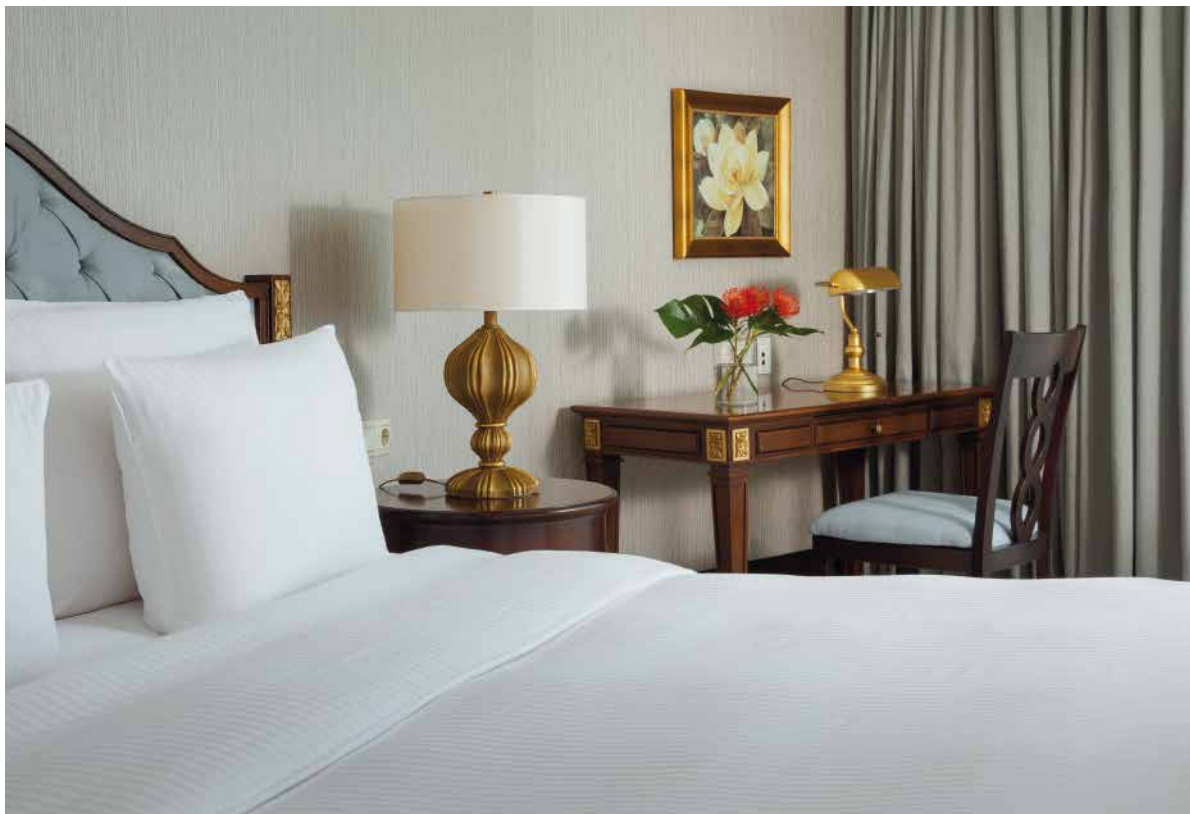
Email: V_Sireyeva@thunderbird-ww.kz
Website: www.Cbsd.kz

Founded in 2010 as a part of Thunderbird School of Global Management, Thunderbird Worldwide is a market leader in developing and providing business training, management development, and specialized HR solutions for Kazakhstan and international companies throughout the CIS.

Thunderbird WorldWide Kazakhstan's focus is on introducing the best global business practices to its clients, thereby helping customers' companies boost their effectiveness.

Thunderbird develops comprehensive business solutions today that will take our clients into the future. With the best global management education, Thunderbird provides localized training and development solutions in Russian and English. The Thunderbird team works with each client individually to find the solution that best fits his or her budget and specific needs and interests.

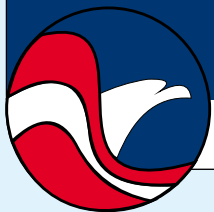




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ALMATY

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AMERICAN CHAMBER OF COMMERCE IN KAZAKHSTAN

MEMBERSHIP APPLICATION

ABOUT AMCHAM

Registered in Kazakhstan as a non-profit organization in March of 1999 with 36 charter members, the American Chamber of Commerce in Kazakhstan currently represents over 200 member companies including US, multinational, and local businesses in 30 industry sectors. Their collective investment in Kazakhstan's economy is several billion USD. The American Chamber in Kazakhstan is a member of the US American Chamber of Commerce in Washington D.C. and has working relationships with many regional business associations.

BENEFITS OF MEMBERSHIP

- ✓ AmCham members participate in an organization existing solely to serve members
- ✓ AmCham actively advocates for reform of the business environment with the Kazakhstan Government at senior levels
- ✓ AmCham members may attend 20 Working Groups in 5 cities plus 3 Inter-Ministerial Working Groups
- ✓ Monthly speaker luncheons with senior government and business leaders are reserved for AmCham members
- ✓ Seminars, conferences, and monthly social networking events are organized for AmCham members
- ✓ AmCham membership contact lists are available exclusively to AmCham members
- ✓ Economic, political, legal, social, and business development information is distributed to AmCham members
- ✓ Member companies provide exclusive discounts on products and services to other AmCham members
- ✓ Access to the Members' Only section on the AmCham Website
- ✓ Publishing opportunities are available in *Investors' Voice*, the *Annual Membership Directory*, and Special Publications

MEMBERSHIP APPLICATION

Company Name:

Industry Area:

CEO Name, Signature, Email:

Contact Individual:

Title(s):

Address:

Tel.: Fax: E-mail:

Please include us in the following Working Groups:

Almaty (7)

- | | |
|--|--|
| ☐ Foreign Investment | ☐ Healthcare Reform |
| ☐ Human Resources | ☐ Trade and Customs |
| ☐ Tax | |
| ☐ Technology and Innovation | |
| ☐ Corporate Social Responsibility | |

Atyrau (4)

- | |
|--|
| ☐ Tax |
| ☐ Human Resources |
| ☐ Trade and Customs |
| ☐ Corporate Social Responsibility |

Aktau (3)

- | |
|--|
| ☐ Human Resources |
| ☐ Tax |
| ☐ Trade and Customs |

Astana (4)

- | |
|---|
| ☐ Foreign Investment |
| ☐ Tax |
| ☐ Trade and Customs |
| ☐ Human Resources |

Shymkent (1)

- | |
|---|
| ☐ Foreign Investment |
|---|

AMCHAM WORKING GROUPS

Working Groups made up of representatives from Amcham member companies provide comment, discussion and submission of positions and represent the united interests of the business community in Kazakhstan by identifying challenges faced by investors and proactively addressing them. Each group meets regularly, providing a forum for networking and the exchange of information. Groups are formed on an as-needed basis at the request of the AmCham membership.

GOVERNANCE

The AmCham is governed by a Board of Directors elected annually from and by the membership. Directors currently and in the past have included individuals from the following company members:

AES	HSBC
AIG Insurance	Hyatt Hotel
Baker & McKenzie	Honeywell
BASF Central Asia	Intercontinental Hotel
BG Group	KIMEP
Bracewell and Giuliani	KPMG
Capital Bank	LeBoeuf, Lamb, Greene
Chevron	Nestle
Citibank	Philip Morris Kazakhstan
Conoco Phillips	Philips Kazakhstan
Coca-Cola	PricewaterhouseCoopers
Dechert	Procter & Gamble
Deloitte	Raytheon
EBRD	Scot Holland CBRE
Ernst & Young	Tengizchevroil
GE International	Visor Capital
Halliburton	

White & Case

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Aminat Akhmatova
Events Coordinator
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REGIONAL REPRESENTATIVES

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Bela.Ferenczi@ge.com

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Resident Representative, Caspian Region
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Wojciech Halat
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Resident Representative, Shymkent
Wojciech.Halat@heidelbergcement.kz

MEMBERSHIP CATEGORIES AND ANNUAL FEES

Corporate A	(Worldwide revenues in excess of 100 million USD)	\$5,000 USD
Corporate B	(Worldwide revenues between 2-100 million USD)	\$3,800 USD
Corporate C	(Worldwide revenues not exceeding 2 million USD)	\$2,700 USD
Non-Profit		\$1,500 USD
Individual**		\$500 USD

***Individual memberships are available only under special circumstances for persons not associated with a company.*

Corporate membership entitles a company to delegate 3 individuals as AmCham voting members. The number of persons from each company participating in working groups, forums, and business roundtables is usually not limited.

All applications for membership must be approved by the Board of Directors of the American Chamber of Commerce in Kazakhstan. For further information about membership benefits, the application process, or Investors' Voice magazine, please contact: info@amcham.kz



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www.metro-kz.com



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